

Performance Progress Reports Reference Guide for Federal Program Officers and Project Technical Monitors (Optional Reviewers)



Performance Progress Reports Reference Guide for Federal Program Officers and Technical Monitors (Optional Reviewers)

Table of Contents

Completing the Performance Progress Report – Simple Version.....	3
Selecting a Technical Monitor as an Optional Reviewer.....	8
Reviewing the Performance Progress Report as a Technical Monitor (Optional Reviewer)	12
Accessing Existing Performance Progress Reports and Financial Reports	15

Grants Online Performance Progress Reports Reference Guide for Federal Program Officers and Technical Monitors (Optional Reviewers)

The purpose of this document is to provide Federal Program Officers (FPO's) and Project Technical Monitors (Optional Reviewers) with a step-by-step process for completing Performance Progress Reports and accessing Performance Progress Reports and Federal Financial Reports in Grants Online.

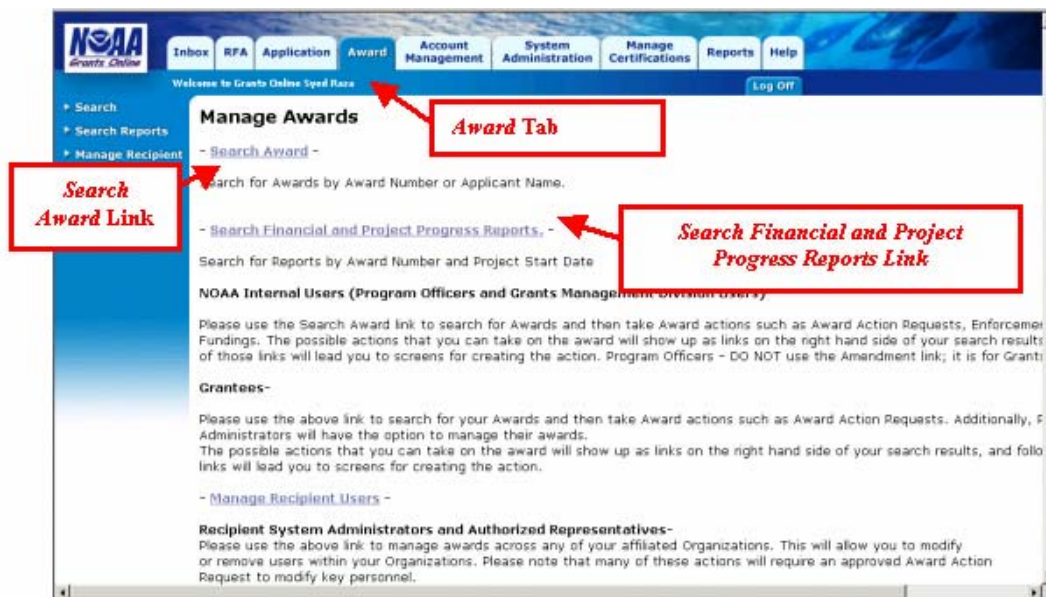
Completing the Performance Progress Report – Simple Version

Step 1: Log into Grants Online by entering your Username and Password.

The screenshot shows the NOAA Grants Online login interface. At the top left is the NOAA Grants Online logo. Below it, a banner reads 'Welcome to Grants Online'. The main content area is divided into several sections: 'General Public' (with a link to 'Public Search'), 'Reviewers' (with links to 'Access current applications assigned to you' and 'Submit your review comments and scores'), 'NOAA Staff' (with links to 'Access current applications assigned to you' and 'Submit your review comments and scores'), and 'Grant Applicants' (with links to 'Access current applications assigned to you' and 'Submit your review comments and scores'). On the right side, there is a login box with fields for 'Username' and 'Password', a 'Password Lookup' button, and an 'Enter' button. A red box with the text 'Username and Password Fields' is drawn around the login box, with red arrows pointing to the 'Username' and 'Password' fields.

Grants Online Performance Progress Reports Reference Guide for Federal Program Officers and Technical Monitors (Optional Reviewers)

Step 2: Select the *Award* tab and click on the *Search Award* link to complete the Performance Progress Report. The *Search Financial and Project Progress Reports* link retrieves previously filed reports (see page 15 of this guide for more detail).



Step 3: After selecting the *Search Award* link, enter at least one search criterion, including *Applicant Name* and/or *Award Number*. Click *Submit*.



Grants Online Performance Progress Reports Reference Guide for Federal Program Officers and Technical Monitors (Optional Reviewers)

Step 4: The following screen displays the search results. To select the Award, click on the actual Award number link in the *Award Number* column.

The screenshot shows the NOAA Grants Online interface. The 'Search for Award' section has search criteria: Applicant Name (empty) and Award Number (empty). Below the search results, a table lists one item found:

Award Number	Org ID	Applicant Name	Project Title	Award Status	Enforcement	Award Action Request	Manage Award	Amendments	Partial Funding
NA17RJ1227	1000532	University of Oklahoma	NOAA Cooperative Agreement Task II Proposal FY06	Accepted	Enforcement	Create Award Action Request	Manage Award Related Records	Create Amendment	Partial Fund this Award

A red box highlights the 'Award Number' column, and a red arrow points to the link 'NA17RJ1227'.

Step 5: Once you have selected an Award, the following *Grants File* screen is displayed.

The screenshot shows the 'Grants File - NA06NES4400002' screen. The header shows the award ID: NA06NES4400002. Below the header, the following information is displayed:

ID: 2019922
 Creator: System Account
 Status: Grants File Approved
 Last Edited User: System Account
 Create Date: 11/21/2005
 Status Date: 11/21/2005

This document currently has no tasks assigned to you. However, you may [view previous workflow history](#).

[View/Add/Remove Attachments](#)

Grant Information

CFDA Number:	11.440	Award Period:	11/11/2005 - 01/31/2010	Program Office:	Fisherie Program
Program Officer:	Robert Smith	Program Officer Phone:	(503)231-2009	Program Officer Email:	1rzsmitt
Total Federal Funding:	\$611,133.00	Total Non Federal Funding:	\$0.00		
Organization:	University of	Electronic			

Grants Online Performance Progress Reports Reference Guide for Federal Program Officers and Technical Monitors (Optional Reviewers)

Step 6: Scroll down to the bottom of the *Grants File* screen to view the *Associated Documents* section and select the ID link next to the Performance Progress Report you would like to complete. On a monthly basis, Grants Online will generate the Performance Progress Reports that are due for each month.

Associated Documents

35 items found, displaying all items.1

Type	ID	Title	Creator	Create Date	Last Action User	Status
Award Action Request	2019987	Reprogram or Rebudget	System Account	11/22/2005	System Account	RecipientAuthorizedRepresentativeActions Complete ForwardToAgency
Award Action Request	2020090	Reprogram or Rebudget	System Account	11/23/2005	System Account	RecipientAuthorizedRepresentativeActions Complete ForwardToAgency
Award Action	2020135	Reprogram or	System Account	11/23/2005	System Account	Completed
Performance Progress Report	2035984	01/01/2005 - 06/30/2005	Fahima Zahir	02/23/2006	Fahima Zahir	IN Progress

Select the ID link of the Report you would like to complete

Step 7: Select the link entitled, *Go to Performance Progress Report Details Page*.

Go to "Performance Progress Report Details Page" link

Performance Progress Report - NA17RJ1227

Id: 2019960
 Creator: Katrin Maslyn
 Status: Performance Progress Report - Creation In Progress
 Last Edited User: Katrin Maslyn
 Create Date: 11/12/2005
 Status Date: 11/12/2005

[Go to Performance Progress Report Details Page >>](#)

This document currently has no tasks assigned to you. However, you may [view previous workflow history and comments >>](#)

Grant Information

CFDA Number:	11.432	Award Period:	07/01/2001 - 04/30/2007	Program Office:	OAR Cooperative Office (CIPO)
Program Officer:	John Cortinas	Program Officer Phone:	3017132465	Program Officer Email:	john.cortinas@noaa.gov
Total Federal Funding:	\$24,391,093.14	Total Non Federal Funding:	\$0.00		
Organization Name:	University of Oklahoma	Electronic Recipient:	No		
Progress Report Frequency:	N/A	Financial Report Frequency:	N/A		

Grants Online Performance Progress Reports Reference Guide for Federal Program Officers and Technical Monitors (Optional Reviewers)

Step 8: The *Performance Progress Report - Simple Version* screen is displayed. Select the comment icon to add comments or view comments entered by other users. The comments are viewable by all users including internal NOAA users and recipients.

Grant Information

CFDA Number:	11.432	Award Period:	07/01/2001 - 04/30/2007	Program Office:	OAR Cooperative Office (CIPO)
Program Officer:	John Cortinas	Program Officer Phone:	9017132465	Program Officer Email:	tjohn.cortinas@noaa.gov
Total Federal Funding:	\$34,391,093.14	Total Non Federal Funding:	\$0.00		
Organization Name:	University of Oklahoma	Electronic Recipient:	No		
Progress Report Frequency:	N/A	Financial Report Frequency:	N/A		
Project Title:	UNIVERSITY OF OKLAHOMA CIMMS FIVE-YEAR PLAN				

Performance Progress Report - NA17RJ1227 -- Simple Version

Please click on this icon to add your comments or view comments by other users on this report: 

[Spell Check](#)

Step 9: Verify the detailed Performance Progress Report information, including designation of Final Report, Reporting Period, and Due Date. Files may be attached by selecting the *Attach Files* link. Please note that only the *Simple Version* is authorized for use at this time. Once all the information has been verified and the files have been attached, click the *Save* button followed by the *Complete Report* button. This action will start the workflow for NOAA acceptance of the Progress Report.

Final Report
☐ Yes ☐ No

Reporting Period *
 01/01/2005 - 06/30/2005
 (mm/dd/yyyy) (mm/dd/yyyy)

Due Date
 07/30/2005
 (mm/dd/yyyy)

Recipient Primary Investigators:
 2 items found, displaying all items.1

Name	Telephone
Zellner, Arnold	312-702-7145
kumar, alka	1234567890

Recipient Authorized Representative:
 Nothing found to display.

[Attach Files](#)

[Click here to use the Expanded version of this report](#)

[Save](#) [Complete Report](#) [Cancel](#)

Grants Online Performance Progress Reports Reference Guide for Federal Program Officers and Technical Monitors (Optional Reviewers)

Selecting a Technical Monitor as an Optional Reviewer

Step 1: After clicking the *Complete Report* button, the assigned Program Officer will have a task titled *Review Progress Report*. Select the *View* link.

The screenshot shows the 'Inbox Tasks' section of the Grants Online interface. A red box labeled 'Review Task' points to the 'Review Progress Report' task in the list. The task list has columns for 'View', 'Task Id', 'Award Number', 'Task Name', 'Task Status', and 'Document Type'.

View	Task Id	Award Number	Task Name	Task Status	Document Type
View	72475	NA05NMF4070005	Review Progress Report	Not Started	Performance Progress Report
View	70099	NA06NMF4050005	Procurement Request and Commitment of Funds	Not Started	Procurement Request and Commitm Funds
View	70097	NA06NMF4050005	Complete PO Checklist	Not Started	PO Checklist
View	70068	NA04NMF4340065	Review Award File	Not Started	Award File
View	70066	NA04NMF4340058	Review Award File	Not Started	Award File

Step 2: On the Progress Report Launch Page, the Program Office has several workflow options. In this example, we will send the Progress Report to two Project Technical Monitors (optional reviewers) for review. To set up the Technical Monitors as optional reviewers, choose *View Progress Report* and click *Submit*.

Performance Progress Report - NA05NMF4070005

Id: 2019151
Creator: Cynthia Binkley
Status: Performance Progress Report Review Progress Report Not Started
Last Edited User: Cynthia Binkley

The screenshot shows the 'Performance Progress Report - NA05NMF4070005' page. A red box labeled 'Workflow Options' points to the 'View Progress Report' option in the 'Action' dropdown menu. The page includes a 'Comment' field, a 'Submit' button, a 'Spell Check' button, and a 'Save Comment' button.

Action: Please select an action
Comment: Accept Progress Report
Reassign Progress Report
Send Progress Report for Optional Review
[View Progress Report](#)

Submit **Workflow Options**

Spell Check

Save Comment

[View previous workflow history and comments >>](#)

Grants Online Performance Progress Reports Reference Guide for Federal Program Officers and Technical Monitors (Optional Reviewers)

Step 3: On the Progress Report Details page, click the *Add* button to add Reviewers.

Recipient Authorized Representatives:

4 items found, displaying all items.1

Name	Telephone
Virginia Herring	601875-5912
Virginia Herring	601875-5912
Jason Keenum	228-875-5912
Jason Keenum	228875-5912

Optional Reviewers:

Nothing found to display.

Add **Done**

Please hit 'Done' to save the new route

Add Reviewers

[Attach Files](#)

Save **Complete Report** **Cancel**

Step 4: Search for the Technical Monitor (optional reviewer) and click on the *Select* link when found. You may also add a new user from this screen. Clicking *Select* will return you to the *Progress Report Details* page.

Search Users

Please leave all fields empty to search for all results

Enter search terms to find a user.

First Name
Middle Name
Last Name
Organization
E-Mail Address
State

Search **Cancel**

One item found.1

Action	Name	Organization	Title	Primary Phone	Primary Address
Select	WHITE, SUSAN	NOS Office of Ocean and Coastal Resource Management (OCRM)		3017133155	1305 EAST WEST I SPRING, MD 20910

[Add a new user >>](#)

Select User From Returned List

**Grants Online Performance Progress Reports
Reference Guide for Federal Program Officers and Technical Monitors
(Optional Reviewers)**

Step 5: On the *Progress Report Details* Page, when finished adding Reviewers, click the *Done* button. You are returned to the Progress Report Launch Page.

Optional Reviewers:

2 items found, displaying all items.1

Name	Action
Jeffrey Brown	Remove
SUSAN WHITE	Remove

Add Done

Please hit 'Done' to save the new route

*Click Done when Finished
adding Reviewers*

[Attach Files](#)

Save Complete Report Cancel

Step 6: On the Progress Report Launch Page, launch the Optional Review. The task to conduct the Progress Report Review will be placed in all the Technical Monitors (optional reviewers) inboxes simultaneously.

Action: Send Progress Report for Optional Review ▾ **Submit**

Comment: Please select an action
Accept Progress Report
Reassign Progress Report
Send Progress Report for Optional Review
View Progress Report

Spell Check

Save Comment

[View previous workflow history and comments >>](#)

Start the Optional Review

Grants Online Performance Progress Reports Reference Guide for Federal Program Officers and Technical Monitors (Optional Reviewers)

Step 7: The task to Review the Progress Report is still in your inbox. You will receive a notification when the Technical Monitors (optional reviewers) have completed their tasks. You do not have to wait for the reviews to be returned before certifying. Certification will remove any tasks remaining in the Optional Reviewers' inboxes for this Progress Report.

7 items found, displaying all items.1

View	Task Id	Award Number	Task Name	Task Status	Document Type
View	72475	NA05NMF4070005	Review Progress Report	In Progress	Performance Progress

*Navigate to the
Progress Report*

View the Workflow

Performance Progress Report - NA05NMF4070005 WorkFlow History Page

Name	Date Started	Date Completed	Performer	Role	Action Taken	Current Status
Review Progress Report	2005-11-18 14:14:39.0		Cynthia Binkley	ProgramOfficer	SendOptionalReview	In Progress
Review Progress Report			SUSAN WHITE	OptionalReviewer		Not Started
Review Progress Report			Jeffrey Brown	OptionalReviewer		Not Started

[Cancel](#)

All Reviewers and Program Officer have active tasks.

Grants Online Performance Progress Reports Reference Guide for Federal Program Officers and Technical Monitors (Optional Reviewers)

Reviewing the Performance Progress Report as a Technical Monitor (Optional Reviewer)

Step 1: After the Program Officer has selected the action to send the Progress Report to the optional reviewer, the Technical Monitor (optional reviewer) will have a task to review the Progress Report. Click on the Tasks link on the left side of the page to see assigned tasks. To view the report, select the **View** link next to the **Review Progress Report** task.

The screenshot shows the 'Inbox Tasks' page in the NOAA Grants Online system. The left sidebar contains a 'Tasks' link. The main content area shows a table of tasks. A red box highlights a task row, and an arrow points from the 'View Link' label to the 'View' link in that row.

View	Task Id	Award Number	Task Name	Task Status	Document Type	Document Id	Start Date	Completed Date	FFO Number	Applicant Name
View	100838	NA06NES4400002	Review Progress Report	Not Started	Performance Progress Report	2035984			NES015- NES015PO- 2006- 2000461	University of Chicago

View Link

Step 2: The Technical Monitor (optional reviewer) will then have the option to submit optional review comments or view the Progress Report. First the Technical monitor will view the Progress Report and then select the action to submit optional review comments. To view the Progress Report, select **View Progress Report** from the action drop down menu followed by the **Submit** button.

The screenshot shows the 'Performance Progress Report' page for award NA06NES4400002. The 'Action' dropdown menu is open, showing 'View Progress Report' as the selected option. The 'Submit' button is highlighted with a red box.

Performance Progress Report - NA06NES4400002

Id: 2035984
 Creator: Fahima Zahir
 Status: Performance Progress Report Review Progress Report Not Started
 Last Edited User: Robert Z. Smith
 Create Date: 02/23/2006
 Status Date: 02/26/2006

Action: Please select an action
Please select an action
Submit Optional Review Comments
View Progress Report Submit

Comment:

Spell Check
Save Comment
[View previous workflow history and comments >>](#)

Grants Online Performance Progress Reports Reference Guide for Federal Program Officers and Technical Monitors (Optional Reviewers)

Step 3: The *Performance Progress Report - Simple Version* screen is displayed. Select the comment icon to add comments or view comments entered by other users. The comments are viewable by all users including internal NOAA users and recipients.

Grant Information

CFDA Number:	11.422	Award Period:	07/01/2001 - 04/30/2007	Program Officer:	OAR Cooperative Office (CIPO)
Program Officer:	John Cortinas	Program Officer Phone:	9017132465	Program Officer Email:	john.cortinas@noaa.gov
Total Federal Funding:	\$34,391,093.14	Total Non Federal Funding:	\$0.00	Electronic Recipient:	No
Organization Name:	University of Oklahoma	Financial Report Frequency:	N/A		
Progress Report Frequency:	N/A				
Project Title:	UNIVERSITY OF OKLAHOMA CIMMS FIVE-YEAR PLAN				

Performance Progress Report - NA17RJ1227 -- Simple Version

Please click on this icon to add your comments or view comments by other users on this report: 

[Spell Check](#)

Step 4: Verify the detailed Performance Progress Report information, including designation of Final Report, Reporting Period, and Due Date. To view the attached files, select the *Attach Files* link. Once all the information has been verified, select the *Cancel* button.

[Spell Check](#)

Final Report
☒ Yes ☐ No

Reporting Period *
 -
(mm/dd/yyyy) (mm/dd/yyyy)

Due Date

(mm/dd/yyyy)

Recipient Primary Investigators:
 2 items found, displaying all items. 1

Name	Telephone
Zellner, Arnold	312-702-7145
kumar, alka	1234567890

Recipient Authorized Representatives:
 Nothing found to display.

[Attach Files](#)

[Cancel](#)

Grants Online Performance Progress Reports Reference Guide for Federal Program Officers and Technical Monitors (Optional Reviewers)

Step 5: After viewing the Progress Report and entering comments in the Progress Report details page (see steps 3 and 4), you may enter additional internal comments in the comment field below the **Submit** button on the Performance Progress Report launch page. These comments will be viewable only by NOAA internal personnel through the workflow history link. After entering your comments, click the **Save Comment** button. Select **Submit Optional Review Comments** from the action drop down menu followed by the **Submit** button. This completes the **Review Progress Report** task for the Technical Monitor (optional reviewer).

NOAA Grants Online

Inbox RFA Application Award Account Management System Administration Manage Certifications Reports Help

Welcome to Grants Online Susan White Log Off

Performance Progress Report - NA06NES4400002

Id: 2035984
Creator: Fahima Zahir
Status: Performance Progress Report Review Progress Report In Progress
Last Edited User: Robert Z. Smith
Create Date: 02/23/2006
Status Date: 02/26/2006

Action: Submit Optional Review Comments **Submit**

Comment:

Submit button

Spell Check

Save Comment

[View previous workflow history and comments >>](#)

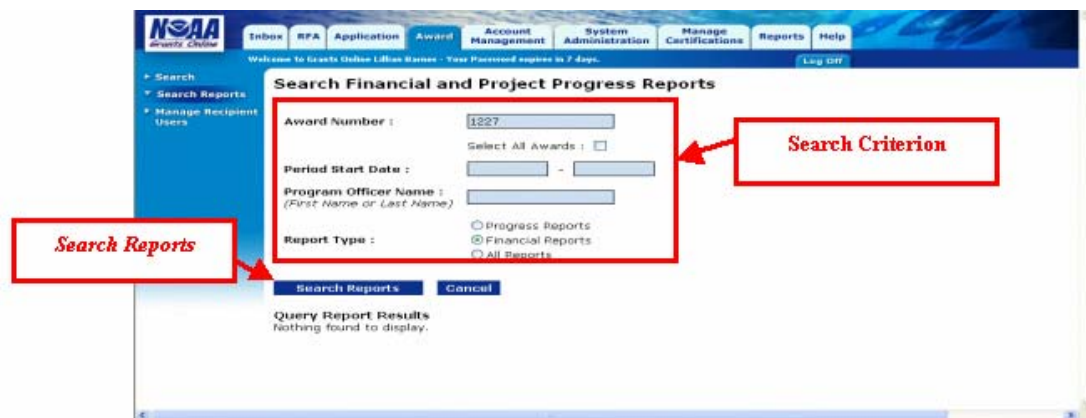
Grants Online Performance Progress Reports Reference Guide for Federal Program Officers and Technical Monitors (Optional Reviewers)

Accessing Existing Performance Progress Reports and Financial Reports

Step 1: In order to search Financial and Performance Progress Reports, select the *Search Financial and Project Progress Reports* link from the *Award* tab.



Step 2: The screen below is displayed. Enter at least one search criterion, including *Award Number*, *Period Start Date*, *Program Officer Name* and *Report Type*. After entering the search criteria, click the *Search Reports* button.



Grants Online Performance Progress Reports Reference Guide for Federal Program Officers and Technical Monitors (Optional Reviewers)

Step 3: The search results display all report types including the Performance Progress Reports and Financial Reports. To view a specific report, select the link for the report you would like to view from the **Report** column. This section will detail Financial Report information. (If you were to select the link for a Progress Report, you would have access to view the Progress Report information as detailed in pages 3-7 of this document.)

Report Column

Reporting Start Period Column

Report	Award Number	Reporting Period Start	Reporting Period End	Due Date	Program Officer
Financial Report	NA17RJ1227	04/01/2002	09/30/2002	10/30/2002	Undefined
Financial Report	NA17RJ1227	04/01/2002	09/30/2002	10/30/2002	Undefined
Financial Report	NA17RJ1227	04/01/2003	09/30/2003	10/31/2003	Undefined
Financial Report	NA17RJ1227	04/01/2003	09/30/2003	10/31/2003	Undefined
Financial Report	NA17RJ1227	04/01/2004	09/30/2004	10/31/2004	Undefined
Financial Report	NA17RJ1227	04/01/2004	09/30/2004	10/31/2004	Undefined
Financial Report	NA17RJ1227	07/01/2001	09/30/2001	10/30/2001	Undefined
Financial Report	NA17RJ1227	07/01/2001	09/30/2001	10/30/2001	Undefined
Financial Report	NA17RJ1227	10/01/2001	03/31/2002	04/30/2002	Undefined
Financial Report	NA17RJ1227	10/01/2001	03/31/2002	04/30/2002	Undefined
Financial Report	NA17RJ1227	10/01/2002	03/31/2003	04/30/2003	Undefined
Financial Report	NA17RJ1227	10/01/2002	03/31/2003	04/30/2003	Undefined
Financial Report	NA17RJ1227	10/01/2003	03/31/2004	04/30/2004	Undefined
Financial Report	NA17RJ1227	10/01/2003	03/31/2004	04/30/2004	Undefined
Financial Report	NA17RJ1227	10/01/2004	03/31/2005	04/30/2005	Undefined

Please note that a Federal Program Officer (FPO) has view only access to the Federal Financial Progress Reports. Also, reports that were migrated from the NOAA Grants System (NGS) will display “Undefined” under the Program Officer column.

Grants Online Performance Progress Reports Reference Guide for Federal Program Officers and Technical Monitors (Optional Reviewers)

Step 4: The *Federal Financial Report - Simple Version* screen is displayed. Select the comment icon to add comments or view comments entered by other users. The comments are viewable by all users including internal NOAA users and recipients.

Grant Information

CPDA Number:	11.432	Award Period:	07/01/2001 - 04/30/2007	Program Office:	OAR Cooperative Institutes Program Office (CIPO)
Program Officer:	John Cortinas	Program Officer Phone:	3017132465	Program Officer Email:	john.cortinas@noaa.gov
Total Federal Funding:	\$35,770,102.14	Total Non Federal Funding:	\$0.00		
Organization Name:	University of Oklahoma	Electronic Recipient:	No		
Progress Report Frequency:	Semi-Annually	Financial Report Frequency:	Semi-Annually		
Project Title:	UNIVERSITY OF OKLAHOMA CIMMS FIVE-YEAR PLAN				

Federal Financial Report - NA17RJ1227 -- Simple Version

Please click on this icon to add your comments or view comments by other users on this report.

Comment Icon

Step 5: The *Federal Financial Report - Simple Version* screen displays the Financial Report details including whether the report is the *Final Report*, the *Reporting Period* and the *Due Date*. The *Attached Report* radio buttons indicate the types of reports: SF-269, SF-272, or both.

When a report is generated, data related to *Cash Receipts (drawdowns)* and *Federal Funds Authorized* is retrieved from the CBS system. Once this report has been submitted to NOAA, these fields are locked records and are no longer pulled from the CBS system.

Please note that migrated Awards will not have reports attached; as such, the *Attached Report* field will indicate which type of report was migrated from NGS.

Final Report

☐ Yes ☒ No

Reporting Period *

04/01/2002 - 09/30/2002
(mm/dd/yyyy) (mm/dd/yyyy)

Due Date

10/30/2002
(mm/dd/yyyy)

Attached Report Type(s)

☐ SF-269
☒ SF-272
☐ Both

Cash Receipts (Drawdowns): \$0.00
Federal Funds Authorized: \$0.00

Recipient Business/Financial Representatives:
One item found: 1

Name	Telephone
Unknown Cr	

Grants Online Performance Progress Reports Reference Guide for Federal Program Officers and Technical Monitors (Optional Reviewers)

Step 6: At the bottom of the *Federal Financial Report - Simple Version* screen, you can click the link entitled, *Attach Files* to view any attached files. You may also select the *Cancel* button to return to the Federal Financial Report launch page.

Recipient Authorized Representatives:
7 items found, displaying all items.1

Name	Telephone
Stephen Barton	208334-3781
Mary Dudley	
Mary Dudley	208-327-7099
Bill Hutchinson	2083343791
James Lau	208334-3791
Virgil Moore	208334-3791
Jeff Seward	208334-3781

Attach Files link and *Cancel* button

[Attach Files](#)